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ABSTRACT

Staff development is a requirement adopted by the Oregon Board of Education in the elementary/secondary standards as well as in state statutes. The purpose of these guidelines is to assist local Oregon school districts' board members and administrators in meeting staff development needs. The contents are suggestions; final responsibility for interpretation and application rests with local administrators. Major conditions that must be addressed in staff development programs are the needs of the individuals as they work toward their personal goals, and the needs of the districts as they work to develop greater excellence. This publication considers (1) the roles of the board and administrators; (2) basic guidelines to be considered; and (3) wellness of employees. The guide concludes with instructions to districts to institute an evaluation plan for their staff development programs. Appendices contain applicable statutes and rules, definitions, a sample model policy for a staff development program, a brief bibliography, sources of assistance, and a checklist for evaluating the staff development plan. (MLF)

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PERSONNEL MANAGEMENT ADVISORY COMMITTEE

# Suggested Personnel Policy Guidelines

# For School Districts

PERSONNEL DEVELOPMENT FOR SCHOOL IMPROVEMENT

June 1985

Milt Baum, Associate Superintendent
Management Services Division

A Joint Publication With
The Oregon Council For Continued
Professional Development

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## FOREWORD

The purpose of these guidelines is to assist local school districts, their board members and administrators, in an orderly approach to meeting staff development needs. This is a high priority activity that school districts must provide in order to select, improve and retain employees so that the best possible service may be provided students in Oregon schools.

This document was jointly prepared by the Personnel Management Advisory Committee of the State Board of Education and the Oregon Council for Continued Professional Development, an interagency council with membership representing the Department, higher education, teacher groups and the Oregon Educational Coordinating Commission. Both groups are to be commended for providing this fine statement on the present need for improvement as outlined in the Oregon Action Plan for Excellence.

The contents of this document are only <u>suggestions</u> for school boards and administrators. Each district should develop its own policies and procedures which will best reflect its needs. Final responsibility for interpretation and application rests with local administrators. Legal advice should be sought as the guidelines are prepared locally.

Members of both groups are interested in your comments for improving and updating this publication. If you have questions or suggestions, please contact the Personnel and Legal Section of the Department of Education, 378-4772.

Verne A. Duncan
State Superintendent of
Public Instruction

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TABLE OF CONTENTS


| TITLE | Page |
|---|---|
| Foreword | iii |
| What is Personnel Development? | 1 |
| What is It All About? | 1 |
| Scenario Number 1 | 1 |
| Scenario Number 2 | 2 |
| Scenario Number 3 | 2 |
| What is the Intent of This Document? | 4 |
| What are the Factors That Affect Staff Development? | 5 |
| What is the Role of the District Board and Administration? | 6 |
| What Basic Guidelines Must Be Recognized? | 8 |
| What is a District Wellness Plan? | 11 |
| How are Healthy Conditions Maintained? | 12 |
| Summary | 13 |
| How Effective are the District's Programs? | 15 |
| Staff Development | 15 |
| Program Improvement | 15 |

APPENDICES:

| | |
|---|---|
| A. Statutes and Rules | 17 |
| B. Definitions | 19 |
| C. Sample Model Policy for a District School Staff Development Program | 21 |
| D. Bibliography | 22 |
| E. Sources of Assistance | 23 |
| F. Checklist for Evaluating the Staff Development Plan | 24 |

# WHAT IS PERSONNEL[1] DEVELOPMENT?

## What is it all about?

School board members and administrators all accept responsibility for staff development. In practice, however, efforts to design such programs range across a wide variety of programs, probably growing more out of opinions held by district leadership than on factors such as staff needs, available resources, district size or location and research studies. But recent reports emphasize the important role of employees in the identification of needs and the design of programs to meet these needs.

Staff development is a requirement adopted by the Oregon Board of Education in the elementary/secondary standards. This requirement is supported by other Board rules and by state statutes, and is also found in various parts of the Oregon Action Plan for Excellence. Districts will be expected to improve the programs that they plan and implement to meet these requirements. See Appendix A for the exact language.

There are many ways to describe the personnel development procedures now used by school districts. There are those that describe a situation as it now exists, and there are others that describe conditions as they might exist or as we would want them to exist. The following Scenarios 1 and 2 demonstrate little attention to staff needs and the expectations of the state for improvement of personnel programs. Scenario 3 represents a different approach.

### Scenario No. 1

*Maybelline School System 3J is one of the elementary districts that transfers students into Millcreek Union High School. Maybelline consists of two elementary buildings of about 220 students and a middle school of 275 children. There are 39 teachers in the district.*

*On August 2 the superintendent and principals met in the middle school library, which functions also as the district's boardroom, to plan for the opening days of the new school year. One of the principals remembered hearing a very dynamic speaker at one of the Confederation of Oregon School Administrators' (COSA) workshops held the previous spring. The workshop topic was "Teaching Your Way." The superintendent offered to make a telephone call to see if the speaker would be available. The principals began to outline the program for the inservice day. One principal suggested contacting the high school to see if a joint inservice day might be arranged and volunteered to make that call. It was suggested that the other two small*

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[1] "Personnel," "professional" and "staff" are used interchangeably in the development programs presented in this document. They are meant to include <u>all</u> employees.

*elementary districts might be interested in this program too. This would cut down on the costs to Maybelline and give a sense of unity to have all the teachers together for a day.*

*So it came about that 88 unprepared teachers and six administrators gathered on August 29 for coffee, lecture and lunch in the Millcreek auditorium. The administrators now felt that staff development needs for the year were met, and turned to other things.*

Comment: There was no staff involvement, no identification of staff or district needs, no preparation of staff for the speaker and no planning to build the programs into other year-long activities.

## Scenario No. 2

*Principal Tom Brimmer looked at the stack of papers at his left and the list of names in his hand. He was over halfway through and hoped that the whole process could be finished by the end of the week.*

*There was a light tap on the door and Tom motioned the art teacher to come in. "How have these first two weeks been?" Tom asked. "Fine. We're off to a good start," was the reply. Tom got right to the business at hand. "I see you have the form we sent around. What have you identified as your goals for the year?" The conversation went on for another five minutes, Tom making notes on the form which was already signed by the teacher. After offering his help, Tom rose and moved to the door. By the end of the week, he had met with all employees, and with a little careful monitoring over the next few months, the district's professional development needs would be met.*

Comment: There was no reference to teacher-identified needs and plans for the year, which had already started. The major emphasis in this procedure is an evaluation which is not necessarily related to staff development and the needs of the district.

## Scenario No. 3

(Note: Look for the difference between this Scenario and Scenarios 1 and 2.)

*Jeff Stone, Al Waters and Roger Bales were sitting on a log near their campfire just a few yards from the edge of Lake Marie. Jeff and Al had 15 years of high school teaching between them, 7 years more than Roger had as a building principal. This was the second fishing trip the three had made together this summer, and they felt pretty close as the day slipped quietly away through the valleys.*

*As it often did, the talk kept vacillating between fishing and school. Tonight, Roger seemed to be doing some fishing of his own.*

*"A couple of board members asked me if teachers were careful about self-renewal and professional growth," Roger said to the fire. "I told them some are; some aren't." Al Waters nodded agreement but said nothing. "They*

*wanted to know how the board might be of more help," continued the principal. "What do you guys think?" That started a three-way discussion that terminated only when the three men went off to their tents and sleeping bags.*

*After returning home on Friday afternoon, Roger, the school principal, opened his pocket notebook to review his notes of their conversation.*

*It was in the form of a list:*

- *Let's get away from a focus on teaching strategies as the only area of concern.*
- *Why not concentrate on excellence?*
- *That means program improvement. And that requires program assessment so we know where we're strong and not so strong.*
- *How do we do that? Maybe concentrate on one or two programs first.*
- *The board could supply us with a researcher from the college to help design the assessment program. This will tie-in nicely with the new standard from the State board on district evaluation and planning.*
- *We need to get suggestions of assessment strategies from teachers--Jeff and Al will get a volunteer group--let's not call it a "quality circle"--rather a project board or project committee.*
- *As we identify program weaknesses, and decide what to do to overcome them, we plan professional development; the board needs to be in at the beginning to prepare for support costs.*
- *All this will take time; we should develop a two- to three-year plan and regularly revise and update this plan.*
- *It is essential that this be a teacher-oriented, teacher-directed, program and outcome-focused operation.*
- *We will want to set up a similar model with noncertificated staff.*

*Roger thought about all the work ahead. He guessed that implementing his notes would be what it takes to begin to meet the professional development needs of his school and district.*

Comment: This document starts with the assumption that Scenario 3 is the approach that begins to describe an adequate staff development program. The emphasis of Scenario 3 is that the goal for all staff development programs is the improvement of instructional programs and that growth cannot take place unless there is a willingness on the part of employees, both collectively and individually, to assist in planning and finding value in the results of a staff improvement program.

Many employees, both teachers and support staff, are well prepared and are doing a fine job in meeting the needs of students and districts. But it is also necessary for them to keep up with changing times reflected within the school district environment and through the needs of the people of the state as determined by the Oregon Board of Education. The following is designed both to respond to current changing conditions and to anticipate, in part, the requirements and standards the Board may set as well as possible statutory changes by the Oregon legislature. (See Appendix A.)

## WHAT IS THE INTENT OF THIS DOCUMENT?

School board members and administrators will now be aware of the need to plan wisely to meet the requirements of Oregon statutes and State Board rules. District leadership will be aware of the need to involve all employees in the identification of district and school program needs, and their own individual and group staff needs.

The solutions to these needs must address these phases of staff development:

- o The needs of the district and school to meet changing times, the challenge for excellence and the improvement of instructional programs and activities.
- o The needs of employees to grow as individuals and as competent persons who are able to carry out the desired improvements in instructional programs.
- o The needs of the district to assist employees in all possible ways to become and stay "well."
- o The need of the district to plan and implement an instructional evaluation program, parallel to one which evaluates staff.
- o The need of every district to establish orientation for new employees to the schools.

This, the first in a series of publications, presents the basic issues on staff development. It is not the intent here to discuss these matters in depth. This will be left to a series of subsequent publications that will provide technical information, the findings of research, the models found in other districts and states, and information that will help board members and district leadership to better plan, implement and evaluate these phases of their programs.

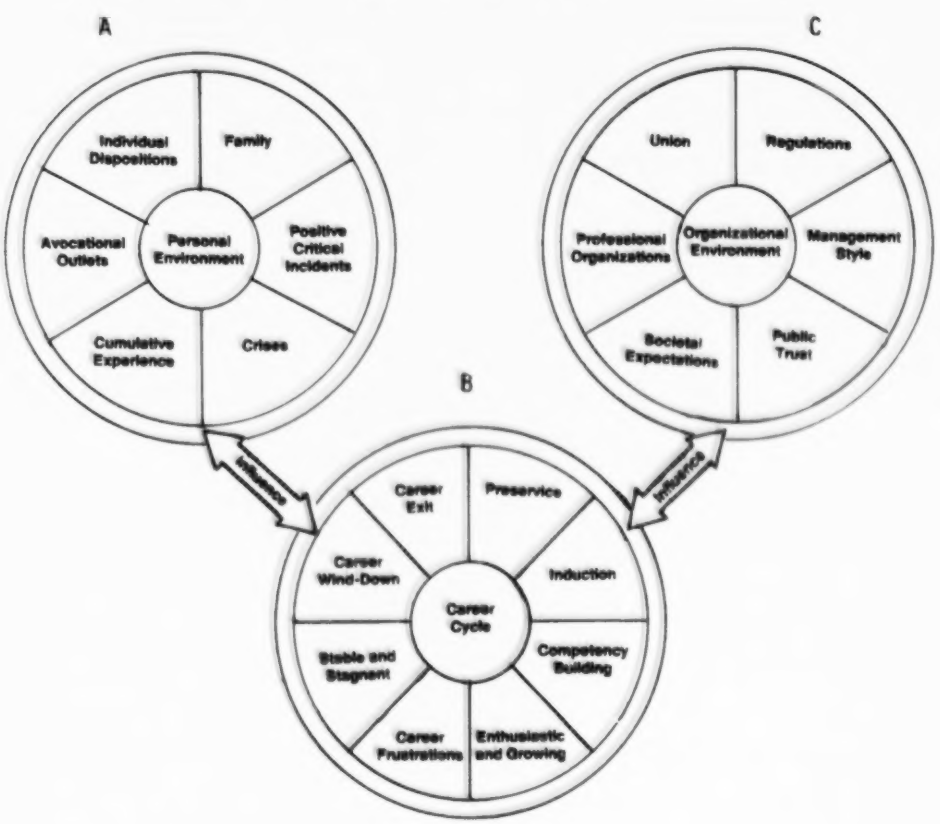
The roles of the district board members and the administrative leadership must be clearly defined and carried out to assure success in the program of staff development. It is important to note again that this document has a particular bias. That is the tie between individual staff development and program development which considers the needs of all employees: those who require certification and those who do not. This tie is complicated to a degree because those who are assigned to a position requiring certification are subject to a set of Oregon laws that apply only to them and, if at all, only by implication to noncertificated personnel. It is anticipated in this document that all employees will be considered and affected alike. A checklist designed to assist districts to develop improvement programs is in Appendix F.

## WHAT ARE THE FACTORS THAT AFFECT STAFF DEVELOPMENT?

Staff development programs are always important elements in the total plans by which individual employees and the school district carry out activities leading to improved instruction and personal growth. It is important to note that there are two major conditions that must be addressed: the needs of individuals as they work toward their personal goals, and the needs of the district as it works to develop greater excellence in the programs that are provided for students and implemented by its staff. These concerns should be kept in mind as the following material is presented and described.

Chart 1 from *Teacher Career Stages: Implications for Staff Development*, Peter J. Burke, Ralph Fessler and Judith C. Christensen, Phi Delta Kappa Fastback No. 214, 1984, shows how these differences interrelate and what each contains. While the content is aimed at "teachers," it presents factors that apply to the needs of all employees.

Chart 1. A model of the stages of the Teacher Career Cycle and the environmental factors that affect it.



No matter what the district intends or what it may require of its staff, each employee is a different individual who has special needs and goals and different reactions to the environment in which he/she lives. This is shown in the chart by the circle A for the "personal environment," which includes the forces that at least in part are at work outside the control of the district. The "environment" plays a major role in the career development of the individual, as shown in B, the "career cycle." Those are the factors that influence one's personal aspirations for growth and movement up a career ladder.

The circle C shows the factors that work within the district and its schools. Here are the persons and organizations that implement the intent of the district, with suggestions of the various roles that they play. The organizational environment includes the community that relates to the district, its schools and employees. It suggests that a well-designed "career ladder" enhances both personnel and programs.

This publication addresses the:

- o role of the district and administration
- o basic guidelines to be considered
- o wellness of employees

*It should be remembered that what follows are SUGGESTIONS. District staff, the school board and legal counsel, as well as input from district residents, should all be included in arriving at decisions for the use of these suggestions.*

## WHAT IS THE ROLE OF THE DISTRICT BOARD AND ADMINISTRATION?

The key element in the planning and the implementing of a program for both organization and staff development is the commitment of the local school board and the administration to the intent of the program. School district board members and administrators must be interested in the matters discussed in this document in order to meet statutory and rules requirements and to work with employees in a humane and responsible manner.

The school district board should require that a process be established to develop, for board approval, the policies and procedures designed to accomplish the goals that are outlined on these pages. The board should adopt and implement policies and procedures in a manner that assures the intent will be reached. Policies and procedures, once adopted, should be subject to regular review and monitoring to be sure they are accomplishing the expected results and that requirements and conditions have not changed. See Appendix C for a sample model policy.

The superintendent as the district educational leader must show by what is said and done that complete support is given to staff needs. The same is true for other district and building level leaders. The role of the principal is generally agreed to be the most important in the implementation of district programs. A recent study found that many principals give a high priority to professional development as an important part of the district program.[2]

School boards and superintendents should provide opportunities for building administrators to receive the necessary training and time to carry out this important leadership role effectively.

Current research indicates that staff development should be anchored to program improvement. This focus departs from previous views on staff development. The evidence is not clear that improving the effectiveness of individual employees will have a major impact on the effectiveness of school programs. In a loosely coupled system, such as schools, it is hard to add up individually selected staff development efforts and show consequences for program improvement. However, it is a basic and reasonable belief of the sponsors of this document that the proposed staff development procedures will lead to improved instruction for and learning by students.

A major decision in the process of staff development by the administration and board is the emphasis that should be given to the three elements of improvement which are included in this document. These elements are the instructional development needs of the district, the professional needs of staff and the wellness needs of all personnel.

While the consensus in this document is emphasis on individual development, the improvement of program content should also help achieve the aims of education programs of the district. It may be easier to allocate funds to implement these activities when this relationship is made clear.

An ideal staff development program will require the district to provide regular staff management functions. These start with the announcement of a vacancy and continue through the process of obtaining applications, interviewing applicants, deciding whom to employ and their placement, professional and personal development, regular evaluation, promotion and, finally, assistance at the time of retirement. These are described in the various earlier publications of the Personnel Management Advisory Committee (see Appendix D).

Therefore, an <u>orientation plan</u> should be developed with advice from all staff groups. It should include consideration for the introduction of strangers to the community served by the district and school, the physical plant and the education programs. These can be prepared in writing and sent to new staff after contracts are signed and when copies of the contract are returned to the new staff members.

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[2]Duke, Daniel and Richard Stiggins, "*Evaluating Principals in Oregon*," unpublished research conducted in part under contract 400-83-005 with the National Institute of Education, October 1984. See also the COSA Special Committee Report on "The Role of School Administrators in Improving Instruction Through Staff Development," Larry Hibbard, chairman.

Next, building principals will want to have a carefully prepared procedure to help new staff as individuals become aware of the special needs and conditions that exist in the assigned school and of any unique features of their assignments. The orientation to the school as a program as well as a building is very important to the effective and speedy integration of new staff members.

The step beyond orientation in the district is focused on professional improvement. A school-based staff development program for employees is intended to give them the assistance they need to function effectively in an ever changing, ever more demanding school environment. The program is intended to serve experienced as well as inexperienced employees, and those working in newly defined positions such as implementing new instructional programs, or modifying disciplinary programs. Specifically, such programs are to bring about:

- o Improved existing school programs
- o Effective job performance
- o Implementation of new school programs
- o Job satisfaction
- o Career development
- o Maintenance of professional and personal skills and attributes.

School-based staff development programs often depend heavily upon colleagues helping colleagues. One program may provide for a year-long "internship" for a beginning teacher. A program may also provide for pooling talent and experience across grade levels or subject areas within a school, across schools within a district, across districts within a region, and across agencies serving schools--including ESDs and institutions of higher education. These resources needed to implement an effective staff development program will then be available to all districts. What is proposed is simply a means of organizing and giving focus to these resources in a manner that supports a comprehensive staff development program <u>within</u> a school.

## WHAT BASIC GUIDELINES MUST BE RECOGNIZED?

A school district that wishes to engage in a careful study of its present and possibly a new staff development program will want to consider the following suggestions. As pointed out in the third scenario, the emphasis is on the concept of "staff development" as the way to involve all personnel in appropriate district supported programs.

The following presents crucial factors to consider in a staff development program:[3]

1. The most critical decision is to link staff development to program improvement as described in Scenario 3.

   This will give emphasis to the joint and equal roles of both individual development and program improvement.

2. Staff development must focus on the school as the workplace.

   Staff development programs must recognize, respect and address the practical nature of teaching and the places where such work occurs.

3. All employees should be represented in planning and implementing school district activities.

   Governance procedures are needed that reflect the legitimate claims of interested parties to have a voice in making decisions about staff development. This is a complicated challenge, requiring creative ideas and compromise among the various interested parties.

4. The building principal is critical to school improvement efforts and must participate in and support staff development programs.

   Effective principals are exceptionally clear about the priority they hold for encouraging student achievement. They are willing to persist in the face of considerable frustration over long periods of time to promote this priority and have the necessary training to accomplish this goal.

   A program that is linked only with the principal may be difficult to implement. One way to reduce this problem is to broaden the concept of who provides the leadership and to promote a leadership role for other school staff members. This could include other building administrators, master teachers, or those who have demonstrated leadership skills. Central office personnel may also be appropriately involved.

5. There are many additional questions district administrators need to address when designing a school-based staff development program.

   a. Being clear about the problem to be solved through staff development, and the outcomes to be achieved through it.
   b. Being clear about the design and operation of the program.

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[3]A district wishing more information on these guideline items may obtain help from the *Proceedings of a Seminar*, "Perspectives on Staff Development: Implications for Oregon's Collaborative Approach to School Improvement." It was sponsored by the Oregon Council for Continued Professional Development and the Oregon Department of Education, supported in part by an Andrew Mellon Foundation grant and held April 1984.

c. Being clear about the costs associated with the program, and how these relate to the benefits expected from it.
d. The kind of evidence that is to be collected on program costs and benefits, and what is to be done with this information.
e. How decisions are to be made about continuing or discontinuing a program once it has been implemented, and who is to be involved in these decisions.

6. Adequate time and resources must be provided for staff development.

Time for staff development must be made available for employees and must be implicit in all job descriptions in both individual development and program improvement.

7. Staff must be approached as adult learners.

Approaches to adult learning include provision for mutual inquiry and planning, self-direction, and self-diagnosis and evaluation. Adults are motivated by needs and tend to use experience as a factor in developing solutions.

8. The use of research findings is important in staff development.

a. The challenge to use research includes four separate parts. The first is to have staff development programs convey research to staff and to help them translate the results, adapt selected processes and convey attitudes of research into classroom action.

b. A second is to apply the findings of research to the practices of staff development.

c. A third is to gather data on the school and district characteristics and operations.

d. A fourth is to integrate the processes and attitudes of research into the work of all employees.

9. District development programs must recognize and respond to transitions in the development of employees.

A tremendous gap separates the experience, training and education necessary to be an employee, and actual practice. Staff need support during times of change in their professional lives: passage from student to employee, from experienced to master employee or the transition to other roles.

10. A high degree of cooperation must be developed and used between the school and community leaders, business and services groups, the facilities in these agencies and individual skills and experiences.

Many school districts have developed programs involving "partnerships" between the school and business community. Such partnerships enables personnel from the school and an agency to interchange programs and services.

*REMEMBER - ALL REFERENCES TO TEACHERS, ADMINISTRATORS AND OTHER SIMILAR LANGUAGE APPLY TO ALL EMPLOYEES, CERTIFICATED AND SUPPORT (CLASSIFIED).*

## WHAT IS A DISTRICT WELLNESS PLAN?

An additional concept that is of growing importance concerns staff wellness. It is a new service that many districts are now providing all employees. It may be important to the district staff development program. The following information will be helpful for understanding the idea of "wellness."

When new employees are assigned and start their work with the district, it is assumed that they enter employment in good "health." A person who has just completed training or is otherwise first qualified for employment is usually young. It is also expected that good health is one of the characteristics of a person who has changed jobs or coming in from another district.

A major reason for wanting employees who are and remain in good health--physical, mental and emotional--is that without this it will be very difficult for a staff member to carry out the daily responsibilities expected of them. Good health is also a sign that good relationships have been developed between employee, student and fellow workers.

The challenge that a district has is to help the employee, all employees, to retain the good condition in which they first came to the district. The many factors that enter into the maintenance of good health are physical, emotional and mental health, and are described on page six, cycle A.

The following lists some of the conditions that may effect the maintenance of health:

- Marriage
- Birth of children
- Inheritance
- Religious experience
- Completion of advanced degree
- Death of loved one
- Divorce
- Illness of loved one
- Personal illness
- Financial loss
- Legal problems
- Abuse in the family
- Crises of friends and relatives

All of these may have an effect on the morale of employees and the efficiency with which they carry out their work. It is in the interest of the district to help identify problems and assist in the reduction of the severity with which they impact on staff. It is wise and worth the effort to do this in order to return individuals to earlier levels of performance and to retain them in the district as effective employees.

## How Are Healthy Conditions Maintained?

Maintenance of good health is becoming a very common concern for school districts in Oregon. A model may be found in industry and other private enterprise groups.

A start can be made by a district interested in maintaining high health levels by making it a part of the staff development programs as outlined in the strategies presented on earlier pages. Staff committees that identify the need, define the type of need, and propose programs to meet these needs will make it possible to have the district plan become the staff plan. Upward flow of activities and decisions is always important.

A "wellness" program addresses one or more of the following needs: weight loss, stress management, nutrition problems, mental health, release from tension or stress. It would also include problems related to overuse of drugs, alcohol, staff smoking and other problems related to the general morale of the employee.

One of the goals that districts have set in the use of these maintenance programs has been the desire to reduce absenteeism. Major research on this matter was reported by the Educational Research Service in a Research Brief completed in 1980.[4] While this was prior to most of the current attention to wellness, it is a useful source of information. It is obvious that a district that reduces the amount of staff absenteeism will also reduce the demand on the district budget for the payment of substitutes. Stress and anxiety were found to be a major factor in absenteeism.

Districts can help reduce stress by:

- o Increasing the effectiveness of communications with adequate feedback.
- o Providing staff improvement programs.
- o Providing for employee participation in decision making.
- o Providing recognition programs and incentives.
- o Providing for a balance between stressful and relaxing duties.
- o Clarifying goals, objectives and priorities of the district.
- o Providing professional growth opportunities.
- o Providing breaks.
- o Reducing the use of school bells.
- o Providing a work station (classroom) that is comfortable and free from temperature control problems.
- o Conducting regular checks of building and grounds conditions needing attention.

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[4] *Employee Absenteeism: A Summary of Research*, Research Brief, Educational Research Service, Inc., 1980.

A more complex concern that employees have is how they may manage their own personal concerns involving stress and emotional problems. The diagnosis of the problem and the assistance that a district may provide in both the diagnosis and prescription of treatment is a highly technical activity. It should be provided by an external agency.

A number of districts may cooperate in the development of a program. The leadership of the education service district or other strategies for cooperative efforts through self-initiated consortia may be a useful approach. Some districts, alone or in concert with others, have entered into contracts with private groups or organizations skilled in the analysis and prescription that is necessary. Occasionally, such a group may be formed in response to a call for such a service by districts that agree that the solution of these problems will be beneficial to the district. Some districts having a staff development program at the time this publication was issued are included in Appendix E.

A district that wishes to initiate an employee assistance program can do so by contracting with a private, professional organization that carries out for the district the details of the program of diagnosing, advising and prescribing corrective procedures. Once employed, district staff members are likely to react positively to an incentive program that is designed to retain them. The fact that such a program is provided by the district will help in attracting applicants.

The district program that provides opportunity for employees to grow and receive promotion within the district may also be a factor in the maintenance of good morale. Some districts define this as a "career ladder" and have made it known to their current, as well as prospective, employees. It may be part of a wellness program.

## SUMMARY

It is in the best interests of students that able persons are employed, that they are properly placed, that they are helped to obtain experience and greater skills to assist students to develop, that they are promoted as appropriate, and that they are helped to overcome personal problems that may effect the quality of the service rendered.

It is obvious that our major focus of attention is on the entire staff: teachers, administrators and all support personnel. There are constantly changing groups within the total staff that must also be considered. Some of these are:

- The employee whose orientation into the district and school requires special attention.
- The first-year employee.

- o The experienced employee new to the district. (Both the new and the new experienced employee need help in becoming acquainted with the demographics of the district and school, the building as a workplace and the classroom as a workstation.)
- o The employee of the district who is given a new assignment or placement on the district career ladder.
- o The fine employee who has fallen below prior levels of performance and who needs help to recover these skills.
- o The marginal employee whose performance is not at the level expected by the district.

It may be noted that this publication does not directly address the needs of the marginal employee mentioned above. However, it is quite possible that what is described on these pages may help such persons to improve and become satisfactory employees.

All individuals can be an asset to the district if they are assisted in appropriate ways to move upward to higher levels of excellence and understanding. It is worth the effort of the district to assist in making this possible. The concepts formulated on these pages have been prepared to help districts carry out these options.

## HOW EFFECTIVE ARE THE DISTRICTS' PROGRAMS?

Each school district should institute a program evaluation plan which addresses the content of this document. It should include both the Program Improvement and Staff Development programs. A checklist to help a district determine its progress may be found in Appendix F.

### Staff Development

1. The existence of the state-required job descriptions, performance standards and individual teacher performance goals provides a framework around which the district may build its staff development program. Each district's standards are expected to state clearly the criteria for performance for employees. Staff development should be an effort to maintain and improve skills in one or more of the areas listed in these standards. Individual employee growth programs should be related to performance standards.

2. Identifying the benefits to employees that derive from the program through addressing the following concerns:

   a. What evidence is being collected on the effects of the program? (If none has been collected thus far, are there plans to do so in the future? What form will this take?)
   b. How long has evidence on effects been collected?
   c. Who has seen this information? How has it been used?
   d. Apart from evidence that has been collected on effects, has the program seemed to make a difference? Has the problem that gave rise to the program been taken care of, or at least reduced?

### Program Improvement

1. The evaluation procedures are part of program evaluation and should include diagnostic elements to be used for further goal setting.

2. The characteristics of quality instruction will guide the staff and administration in the evaluation process. These characteristics should be developed by:

   a. Becoming familiar with the educational literature about effective performance and leadership.
   b. Surveying effective models.
   c. Involving all participants, employees, unions, parents, administrators, students, business and industry in determining the criteria. The criteria should identify desired behaviors of staff and administrators.

3. The development and implementation of an evaluation model can be made by:

   a. Finding or developing a model which most closely fits the district's goals.
   b. Developing or adopting the specific standards or forms to be used.
   c. Identifying sources of assistance (Oregon Department of Education, Education Service Districts, Northwest Regional Educational Laboratory, etc.).

e. Are the services provided through the program of high quality? How could they be improved?

3. Determining the next steps:

   a. Does the program appear to be valued by faculty and administrators? Is there support for its continuation?
   b. Is the program likely to be maintained in its present form, or is it likely to be modified or terminated?
   c. If the program is to be modified, how is this to be done? What role will teachers have in its design? Building administrators?
   d. If the program is to be terminated, who will make the decision to do so? What role will teachers have in this decision? Building administrators?
   e. See checklist, Appendix F.

   d. Including in the formal evaluation process the requirements of state law.

4. The implementation model. This should include:

   a. Training of all staff and administrators in the process so expectations are clearly identified.
   b. Identifying evaluator responsibilities throughout the district.
   c. Preparing target timelines.
   d. Identifying the individual experiences that should be frequently evaluated.
   e. Providing for evaluation input to include not only one's superordinates but one's subordinates (students provide feedback to teachers, teachers provide feedback to principals, principals provide feedback to superintendents).
   f. Using a checklist for annual review of the program. See Appendix F.

APPENDIX A

Statutes and Rules

352.850 Teacher evaluation; form; personnel file content.

(1) The district superintendent of every school district, including superintendents of education service districts, shall cause to have made at least annually but with multiple observations an evaluation of performance for each probationary teacher employed by the district, and at least biennially for any other teacher. The purpose of the evaluation is to allow the teacher and the district to determine the teacher's development and growth in the teaching profession and to evaluate the performance of the teaching responsibilities. A form for teacher evaluation shall be prescribed by the State Board of Education and completed pursuant to the rules adopted by the district school board.

(2)(a) The district school board shall develop an evaluation process in consultation with school administrators and with teachers. If the district's teachers are represented by a local bargaining organization, the board shall consult with teachers belonging to and appointed by the local bargaining organization in the consultation required by this paragraph.

(b) The district school board shall implement the evaluation process that includes:

(A) The establishment of job descriptions and performance standards which include but are not limited to items included in the job description;

(B) A preevaluation interview which includes but is not limited to the establishment of performance goals for the teacher, based on the job description and performance standards;

(C) An evaluation based on written criteria which include the performance goals; and

(D) A post-evaluation interview in which (i) the results of the evaluation are discussed with the teacher and (ii) a written program of assistance for improvement, if needed, is established.

(c) Nothing in this subsection is intended to prohibit a district from consulting with any other individuals.

581-22-715 Personnel Policies

(1) Personnel Policies

(a) The school district shall adopt, implement and maintain personnel policies and plans in compliance, where applicable, with Oregon Revised Statutes and Oregon Administrative Rules, including:

(A) Affirmative action,

(B) Staff development,

(C) Equal employment opportunity,

(D) Evaluation procedures, and

(E) Employe communication system.

(b) Personnel policies shall be accessible to any school employe and notice of their availability to the general public shall be published:
(A) A current copy shall be accessible in each school office and library; and
(B) Any organization which represents employes of the district shall be furnished a copy and revisions as they are made.

581-22-606 Instructional Program

The school district shall maintain a process for evaluating and improving instructional programs. It shall:

(1) Assess student performance annually in reading, writing and mathematics in at least two elementary grades and one secondary grade;

(2) Assess student performance on selected program goals in at least language arts, mathematics, science and social studies in two elementary grades and one secondary grade, prior to the selection of district textbooks and other instructional materials under rule 581-22-520 of these standards;

(3) Utilize appropriate measurement procedures in making such assessment and report results to the community;

(4) Identify needs based on assessment results and establish priorities for program improvement; and

(5) Make needed program improvement as identified in the needs identification process.

APPENDIX B

Definitions

Although a wide array of activities support the continued staff development of school personnel, educators do not appear to have an agreed-to terminology for discussing such activities. After careful consideration, a language was adopted for eight essential terms. These are defined briefly in the paragraphs that follow.

1. STAFF DEVELOPMENT is the gradual and continuing process of accumulating the knowledge, skill and sensitivity needed to function effectively in specified roles in particular school settings, commencing with entry to an approved preparation program and terminating with retirement. The two major phases of professional development involve growth that occurs prior to assuming a position and growth that occurs after assuming such a position.

2. INITIAL STAFF DEVELOPMENT is the acquisition of the knowledge, skill and sensitivity needed to perform effectively upon entry to a particular role within the schools. Generally speaking, programs leading to an initial level of professional development are offered by institutions of higher education and involve a core of work in the liberal arts and sciences, basic studies in the disciplines, basic studies in the profession, and supervised field experiences in schools. Similar preparation for non-certificated personnel will depend on the kind of position.

3. CONTINUED STAFF DEVELOPMENT is the acquisition of new and advanced knowledge, skill and sensitivity that enhance performance subsequent to entry into employment. Continued development occurs through both informal and formal learning experiences. Informal learning experiences include reading, exchange with colleagues, attendance at professional meetings, and on-the-job experiences generally. Formal learning experiences are usually of two kinds: inservice studies and advanced studies.

4. STAFF GROWTH STUDIES are the learning activities that are designed to enhance job performance within a particular school setting. Generally speaking, service studies are designed to satisfy specific staff development needs within a district or a state, and usually are sponsored by a local district, a state agency or a professional association. Some inservice activities may be accepted by institutions of higher education for advanced certification or advanced degrees. Some districts also provide their own system of "credits" for inservice studies and advanced studies.

5. ADVANCED STUDIES are the learning activities that update and expand the knowledge, skill and sensitivity employees bring to a school and community. Generally speaking, advance studies are designed to keep employees abreast of current developments in their field of employment and enhance the conceptual and theoretical base from which they operate. Programs of advanced study usually are offered by institutions of higher education, and usually lead to an advanced certificate, an advanced degree or an advanced license.

6. EFFECTIVE JOB PERFORMANCE is the determination of the way in which an employee of the district carries out the assignment as described in the district-approved job description. This is based on a planned program adopted by the district board that is consistent with the statutes and rules of the state and the findings of the courts. (See Appendix A.)

7. IMPROVEMENT OF EXISTING PROGRAMS is a basic factor in the efforts to arrive at higher levels of excellence. It requires that the district develop and adopt plans and procedures for their implementation that will appraise the effectiveness of the present program, the needs of the students and staff and an awareness of the present status of the research related to program improvements.

8. IMPLEMENTATION OF A NEW PROGRAM is the development of a maximum feeling of "ownership" on the part of those who will implement the new activities. As staff have shared in the development of the program and the manner in which it is to be appraised, so will they be more eager to take part in its use and have an interest in its success. All plans should have built in a plan for starting it, appraising it and changing it as needed after a period of use.

APPENDIX C

Sample Model Policy for a District/School Staff Development Program

It is the policy of the district board to provide a complete program for staff development for all employees. The program shall give appropriate attention to the district curriculum improvement program. The superintendent is assigned responsibility for the development, implementation and evaluation of the program.

The program shall give attention to:

a. The use of all levels of employment and the involvement of representatives from each level in planning and appraisal.

b. The recruitment, employment and assignment of employees.

c. The use of an orientation program for all new employees, both beginners and experienced personnel, and all those given new assignments in the district.

d. The wellness of all employees.

e. The activities designed to adjust curriculum content and instructional methods, and meet the individual needs of employees.

f. Providing a regular appraisal of program effectiveness and a process for making any necessary changes.

APPENDIX D

Bibliography

*Teaching Career Stages--Implications for Staff Development*, by Peter J. Burke, Ralph Fessler and Judith C. Christensen, Phi Delta Kappa Fastback No. 214, 1985.

*Building Morale--Motivating Staff* by Ben Brodinsky, American Association of School Administrators, Critical Issues Report, 1983.

*Teacher Incentives: A Tool for Effective Management*, prepared by Cresap, McCormick and Paget, NASSP, AASA, NAESP, 1985.

*Employee Absenteeism--A Summary of Research*, Educational Research Service, Research Brief, 1980.

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*Evaluation Guidelines for School Personnel*, November 1979
*Constructive Staff Discipline*, 1981
*Staffing Alternatives*, September 1983
*Employment Procedures, Personnel Files*, March 1980
*Employment Procedures, Position Descriptions, Applications and Personnel Files*, May 1979
*Equal Opportunities in Education--Instruction and Employment*, January 1977

APPENDIX E

Sources of Assistance

There are several sources from which a district may get assistance for the development of programs and ways to implement the planned activities. They include but are not limited to:

The Oregon Department of Education
The professional subject organizations; i.e., Oregon Council of Teachers of Mathematics, Oregon Industrial Arts Association, etc.
The professional organizations; i.e., OEA, COSA, Classroom Teachers Association, OFT, OSBA, OACE, etc.
Consortia; i.e., Interagency Council, Valley Education Consortium, Continuing Professional Development Council (CPD), etc.
Support clusters; i.e., Education Service Districts, Career Education staff at ESDs, etc.
Local school districts:
- Salem Public Schools
- Beaverton Public Schools
- North Clackamas Schools
- Centennial Public Schools

Districts in other states:

Upper Perkiomen School District--Staff Development Program--emphasizes instructional skills; East Greenville, Pennsylvania

Dupage High School District--"program promotes employee health and morale"; Villa Park, Illinois

Toledo Public Schools--"The Toledo Plan: Supervision, Evaluation, Goal-Setting"; Toledo, Ohio

APPENDIX F

CHECKLIST FOR EVALUATING THE STAFF DEVELOPMENT PLAN*

| | Yes | No | Need To Check |
|---|---|---|---|
| 1. Employees participate in decisions. | ____ | ____ | ____ |
| 2. Administrators are involved in training. | ____ | ____ | ____ |
| 3. Adequate time is provided for planning, practicing and problem solving. | ____ | ____ | ____ |
| 4. District administrative support is evident and visible. | ____ | ____ | ____ |
| 5. Learning expectations are clearly stated. | ____ | ____ | ____ |
| 6. Training includes demonstration and practice. | ____ | ____ | ____ |
| 7. Training content is focused on improvement of an instructional program. | ____ | ____ | ____ |
| 8. Training adheres to principles of adult learning. | ____ | ____ | ____ |
| 9. Training is extended over a period of time. | ____ | ____ | ____ |
| 10. Employees observe each other in applying learnings (coaching). | ____ | ____ | ____ |
| 11. Regular meetings occur frequently that focus on practical problems. | ____ | ____ | ____ |
| 12. The staff development program is compatible with the realities of work at the building level. | ____ | ____ | ____ |
| 13. The district has a checklist similar to this form. | ____ | ____ | ____ |

*Note: Research indicates that these items are ranked in order of importance.